



In an effort to increase financial professional e-Signature utilization across the industry, we need to fully understand why financial professionals are not using e-Signature. What are the specific barriers for using e-Signature? What must be in place for them to feel more comfortable using e-Signature? What will encourage them to use it in the future?

The Insured Retirement Institute (IRI) has crafted a survey that will provide the data to answer these questions. This data will better inform our strategy to create targeted solutions to address and eliminate the principal reasons why financial professionals are not collecting signatures electronically.

**The objective is to grow adoption through tailored strategies to eliminate the principal reasons for not using e-Signature.**

## **Business goal**

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Increase e-Signature adoption for firms that implement the best practices generated from this survey.

## **Approach**

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- Compile survey with responses – raw responses are provided to sponsoring firms.
- Produce a white paper of results that will be posted on the IRI website.
- Results will be posted on the IRI website with access restricted to IRI members only.
- Best Practices audit that firms can use to benchmark themselves.
- Tailored strategies to address the top three barriers to e-Signature utilization.



## Sponsorship Opportunities

- IRI will hire an outside firm to create and distribute the survey.
  - Based on previous surveys, average survey participation yields 800 responses within a 3-week timeline
  - **Premier Sponsor Cost: \$50,000 total** (ex: 5 premier sponsors \$10,000/each sponsoring firm, 10 premier sponsors \$5,000/each)
    - Includes outside firm management of the survey and an IRI-designed white paper summarizing key data points derived from the survey.
    - Sponsoring firm(s) may submit additional survey questions. Responses to these questions will be provided exclusively to the sponsoring firm(s) submitting them.
    - In addition to the base population of financial professionals, sponsoring firm(s) will also have the opportunity to submit a list of their own financial professionals to be included in the distribution. The information gathered from this subset of financial professionals will be provided to the sponsoring firm.
    - Exclusive webinar or speaking opportunity focused on e-Signature best practices and adoption.
    - An hour-long individual firm review of best practices with the audit checklist where the sponsoring firm stakeholders can ask more specific questions.
    - Sponsoring firm(s) can submit custom questions unique to their purposes.
    - Premier sponsor firm logo on all published content.
  - **Contributing Sponsor Cost: \$3,000**
    - Contributing sponsor firm logo on all published content.
  - **Additional Opportunity: \$10,000**
    - Includes one-on-one deep dive discussions with financial professionals.

**For questions or to reserve a sponsorship opportunity contact:**

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